



Report to the Commissioners
Area IX Agency on Aging, Flathead County
March 19, 2018
Prepared by Lisa Sheppard, Director

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2016 actuals
FY 2017 annual targets
FY 2017 actuals
FY 2017 actuals as a percentage of annual targets
FY 2017 actuals as a percentage of FY 2016 actuals
FY 2018 actuals to date
FY 2018 annual targets
FY 2018 actuals as a percentage of FY 2018 annual targets

The general target is 66.66% for FY 2018, July 1, 2017-February 28, 2018, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

- **Meals**
 - Total meals served continue to be above target for this fiscal year and on pace with actuals for last fiscal year.
- **Transportation**
 - Rides are 9.3% above target for the year at 76% due to the addition of the GNP commuter during the summer season and an 8% increase in Dial-A-Ride rides over this time last year.
 - Overall rides for the month are up by 1,341 over January of last year.
 - Excluding the GNP commuter, rides for the year are now almost on par with this time last year.
 - Fixed route rides, without the addition of the GNP commuter, lag 14.6% due to a substantial decrease in Kalispell city bus rides (mostly on the PM route). However, this is a substantial decrease from the 19% lag from last month. Rides for the Kalispell route (AM and PM) were up again this month, for a two month increase.
- **Information/Referral and Assistance**
 - We continue to experience a high volume of client calls and requests for assistance, due in part to state funding cuts to other services and providers, especially the local DPHHS Offices

of Public Assistance. We continue to work with DPHHS to gain access to the internal Office of Public Assistance database so we can better serve those seeking help. However, we are limited by the size of our staff and our own budget constraints.

▪ **Independent Living Services**

- Although we have resolved our client enrollment issues, we continue to be below target for the number of people served and the number of units of service provided for the year.
- We received notice from DPHHS that we will receive a 2.5% cut to our state funds for FY 2018 (approximately \$10,000) and up to 5% for FY 2019 (approximately \$20,000). To accommodate for these cuts, we have put a temporary hold on new enrollments in IL services. We anticipate managing the cuts through attrition rather than any suspension of services.

AOA Administration

Budget and Contracts

- We completed the draft of the FY 2019 county budget, performance measures and CIP and submitted to Finance. We do not need to fund any CIP items in FY 2019. Annual bus purchases are paid with a combination of federal funding (86.58%) and current year or reserve resources (13.42%).
- DPHHS informed all Area Agencies on Aging we will receive a 2.5% cut in state funds for FY 2018, to be taken out of remaining payments for the year, and up to 5% for all of FY 2019.
- We have completed the final documentation needed to begin serving veterans through the Veteran-Directed Home and Community-based Services (VDHCBS) program (funded by the VA and implemented in partnership with the Area VI Agency on Aging). Commissioners signed the VA Provider Agreement and MOA with Area VI on March 5, 2018. DPHHS will review the final documentation this week after which it will be submitted to the VA for approval.

State/Federal/Legislative Issues

- Lisa participated in an M4A conference call in March and will attend the quarterly meeting in April in Helena.
- Federally, we continue to monitor progress on the budget and advocate for funding for aging services in the current budget process. It is still unclear whether the SHIP program, which supports us to provide Medicare and benefits counseling, will be funded. Other programs that help older adults, such as LIHEAP (low income energy assistance) and CDBG, are in also jeopardy as is Medicaid, which is the single largest payer of long-term care services for older adults and people with disabilities.

Building

- Punch list update:
 - Mike Pence sent a letter to CTA detailing outstanding items, including the reappearance of drywall cracks in the dining room and the unacceptable paint job on the repaired cracks in the lobby ceiling.
 - The small kitchen freezer had been working well but required a service call at the end of February. Mike's letter to CTA indicated we will monitor the freezer's performance through June and expect it to be maintenance free for 60 days in order for us to consider it adequately repaired.
 - We plan to monitor the temperature in the dry storage area in the summer as modifications were made too late in the season to know if they were effective in reducing temperatures.

AOA Advisory Council

- The Advisory Council met on March 8, 2018. The next meeting will be May 10, 2018.
- The agenda included a presentation on caring for individuals with Alzheimer's by staff from Immanuel Lutheran Communities and updates on state and federal funding, the Age-Friendly Flathead initiative and the 5-Year Transportation Development Plan process.

Other

- Staff updated the AOA and Eagle Transit vehicle list/values for insurance purposes.
- Staff sorted through 25+ boxes from the Records Department and approved all for shredding.
- We continue to work on the Continuity of Operations Plan (COOP).

Outreach/Education/Media

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 2/1/18, presentation to Kalispell Senior Center on AOA programs and BEC, 15
- 2/1/18, promoted Extra Help and Big Sky Rx assistance at Flathead Senior Connection at Frontier Hospice, 18
- 2/5/18, monthly KGEZ interview, 11,000
- 2/7/18, presentation to Leaders of Tomorrow, 30
- 2/7/18, hosted The Summit "Healthy Living Crockpot Demonstration," 20
- 2 EC and BEC outreach
 - 2/6/18, Columbia Arms and North Valley Senior Center, 15
 - 2/8/18, Whitefish Manor, Whitefish Community Center, 13
 - 2/14/18, Mountain View Courts in Columbia Falls, 8
 - 2/28/18, Stonecreek Apartments in Whitefish, 8
- 2/14/18, presentation on BEC and AOA services at Community Management Team meeting, 16 participants
- 2/20/18, presented LIEAP information to senior housing residents, 7
- 2/5, 2/23-26/18, promotion of Medicare 101 class, including in DIL Daybook, 17,000
- 2/26/18, presented Medicare 101 class at South Campus, 8

Age-Friendly Flathead

- The Steering Committee held its monthly meeting on 3/15/18. AARP Montana provided the Committee with a report on the 2/17/18 Direct Action Organization session along with a draft informational flier and FAQs for review/edit.
- The next step is to gain elected official support for an application and letter to AARP to begin the 5-year livable community process, which is based on local concerns and interests. On 3/5/18, Lisa briefed Commissioners on the required letter and will provide additional information for their consideration.

Eagle Transit

- Montana Department of Transportation (MDT):
 - 5-Year Transportation Development Planning Grant
 - The Planning Committee will meet next on March 27, 2018 to prepare draft recommendation for changes to the Kalispell/Evergreen routes.
 - The Committee will present the draft recommendations to the Transportation Advisory Committee on April 5, 2018 with stakeholder and public meetings to follow.

- We continue to anticipate a completed plan and roll-out of initial changes by July 1, 2018.
- FY 2019 Transportation Coordination Plan, 5311 Application and Capital Request
 - The final TCP, 5311 Application and Capital Request were approved by Commissioners on 2/20/18 and submitted to MDT on 2/23/18.
- The next quarterly report is due at the end of April.
- Outreach/Education/Media/Special Events:
 - The KPAX commercial continues to run on the CW and on Channel 8 KAJ (CBS morning show, The Price is Right and Jeopardy/Wheel of Fortune.
 - As required by federal regulations, a monthly ad ran in the Daily Inter Lake on 2/14/18.
- Operations:
 - Although we have significantly reduced overtime expenditures, we continue to rely heavily on contracted employees to fill shifts due to drivers on extended leave.
 - Onboard safety cameras have been installed.
 - Staff are working closely with the City of Kalispell and Chandler Communications regarding installation of bus stop signs.
- Transportation Advisory Committee (TAC)
 - The Committee will meet on April 5, 2018 to discuss Planning Committee recommendations for Kalispell/Evergreen route changes.
- Glacier National Park
 - We are working on options for disposing of the Optima buses, ownership of which should be released shortly to Flathead County from the State of Montana.
 - We are working on a modification to the Cooperative Agreement that would allow us to drop collision/property damage coverage on Park-owned buses. It will be ready for Commissioner review shortly.

Nutrition

- We co-hosted a volunteer appreciation luncheon with the Kalispell Senior Center on Saturday in the AOA dining room and senior center activity room. The theme for the event was “We’re so lucky to have you,” inspired by St. Patrick’s Day.
 - 133 volunteers from AOA and KSC plus 31 guests attended the event.
 - Commissioner Krueger thanked the volunteers for their leadership in service to the community.
 - Lisa noted more than 160 AOA volunteers provide over 13, 445 hours of service in 2017, valued at \$282,884.
 - Special recognition was given to Ruth Pomeroy who received the 2017 AARP Andrus award for Montana for her Medicare counseling work at AOA over the last 8 years.
- Nutrition Manager J.R. Isles has completed annual site assessments at the area senior centers/meal sites.
- The annual survey will go out by the end of the month.
- The Flathead County Animal Shelter donated 125 pounds of pet food for senior clients to take for their pets.

I & R/Assistance/Ombudsman/Independent Living Services

- We've selected a template/theme for the new AOA website and have begun drafting content.
- We are planning to expand our Medicare 101 classes from once per month to once a week at the beginning of the new fiscal year. After reviewing what other Area Agencies on Aging charge for these classes, the new fee to attend will be \$25 per person, with five scholarship slots available each class if needed.
- Over the last month, staff have held multiple events at area senior centers and senior housing complexes to assist older adults to apply for the homeowner/renter tax credit (2ECs), which has resulted in individuals getting \$32,524 in refunds. Staff also educated people about the Benefits Enrollment Check-up at these events.
- The annual survey will go out by the end of the month.
- Independent Living Services
 - Because of state funding cuts, we have implemented a waiting list for all IL services.
 - We plan to implement a sliding fee scale system for all IL services no later than the beginning of FY 2019. We are working out the details now.

RSVP

- Grant update: The final FFR is due.
- Lisa finally received assistance from CNCS to gain access to the federal website and will submit the final FFR shortly.

Senior Mobile Home Repair

- The Advisory Board met on 3/14/17. The next meeting will be April 11, 2018 at 10:00 am at Flathead Electric.
- Three (3) projects were completed; 7 are in progress; 12 need assessment; 24 are on the waiting list.

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- The AOA/Kalispell Senior Center Joint Committee meets monthly.
- The meal site agreement with the Lakeside Chapel is still pending.
- We continue to look at options for a new building for the Bigfork Community Center.

March 2018 Report: Performance Measures Tables - February 2018 stats (FY 2018)

66.66%

MEASURE	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 2017 as % FY 2016	Feb	Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
# Receiving Independent Living Services	447	400	178	45%	40%	not yet available	93	93	233	40%
# Receiving Meals on Wheels	471	450	470	104%	100%	21	314	335	465	72%
# Seniors Receiving Congregate Meals	867	980	1,785	182%	206%	74	1,067	1,141	1,000	114%
# Eagle Transit DAR Unduplicated Riders	502	500	401	80%	80%	11	289	300	500	60%
% of Service Recipients at Moderate to High Risk of Institutionalization	94%	88%	89%	101%	95%	90%	90%	90%	88%	102%
Per Meal Cost of Nutrition Services	\$6.30	\$6.50	\$6.89	106%	109%	\$5.99	\$5.90	\$5.99	\$6.75	89%
% Overall Satisfaction with AOA Services from Annual Survey	N = 98%, IL = 95%	95%	N=99% IL=96%	100%	100%	N/A	0%	N/A	95%	100%
Maximum annual number of transportation complaints	27	36	30	83%	111%	1	6	7	36	19%
WORKLOAD INDICATOR	FY 2016 Actuals	FY 2017 Target	FY 2017 Actuals	FY 2017 % of Target	FY 17 as % FY 16		Total Last Report	Total/Avg. to Date	FY 2018 Target	% Target
Outreach/Education/Media						Feb				
Public Outreach/Education/Media Efforts	153	120	123	103%	80%	13	71	84	120	70%
Nutrition						Feb				
Total Meals	78,541	82,000	82,428	101%	105%	6,118	47,818	53,936	79,000	68%
MOW	49,283		49,695	N/A	N/A	3,750	28,120	31,870		
Congregate	29,258		32,733	N/A	N/A	2,368	19,698	22,066		
Nutritional Assessments Conducted	1,451	1,550	2,424	156%	167%	137	1216	1,353	1,550	87%
Transportation						Feb				
Total Ride Count	91,196	94,000	85,305	91%	94%	7,742	60,533	68,275	90,000	76%
Dial-A-Ride Count	30,644	31,020	30,025	97%	98%	2,608	18,146	20,754	30,000	69%
City, Commuter and Other Ride Count	60,552	62,980	55,280	88%	91%	5,134	42,387	47,521	60,000	79%
Eagle Transit Outreach/Special Events	8	10	40	400%	500%	2	24	26	15	173%
Information and Referral/Assistance						Feb				
Info and Referral/Assistance Contacts	19,586	18,000	17,523	97%	89%	1,681	11,131	12,812	18,000	71%
Independent Living			38%			Jan				49%
Homemaker Units of Service	1,616	3,333	784	24%	49%	234	745	979	2,500	39%
Escorted Transportation Units of Service	1,548	2,186	792	36%	51%	190	879	1,069	1,739	61%
Respite Units of Service	2,600	3,315	992	30%	38%	212	1059	1,271	2,468	51%
Community Support/Senior Companion Units of Service	1,322	1,090	1,060	97%	80%	127	635	762	1,353	56%
Personal Care Units of Service	1,150	465	358	77%	31%	14	101	115	435	26%
Benefits Counseling						Feb				
Benefits Counseling Hours of Service	N/A	N/A	600	N/A	N/A	26	354	380	450	84%
Ombudsman						Feb				
Ombudsman consults/cases opened	1454	1,100	1,034	94%	71%	124	661	785	1,100	71%